

9 Evaluation of Proposals

9.1 Introduction

All Bidder Proposals will be evaluated through a multi-step process to determine the responsive proposal that provides the best value to the State. The Best Value Proposal is that proposal whose overall offer best meets the State's needs, when cost, mandatory requirements, and scorable requirements are all considered.

9.2 State Evaluation Team

The State Evaluation Team will consist of approximately fifteen (15) members. The State Evaluation Team will evaluate the proposals submitted by the Bidders including the Administrative Requirements and System and Operation Requirements; they will check the Bidder's references and identify any material deviations in a Bidder's proposal. Also, the team will evaluate costs. To do this the team will be divided into sub-teams with responsibility for specific areas of the evaluation.

9.3 Evaluation and Selection Process

The process for evaluating the Bidder proposals will be a multi-step process. It will employ the following steps in the following order:

9.3.1 Draft Proposal

9.3.1.1 Review of Administrative Requirements

Draft Proposals received by the date and time specified in Section 1.5, Key Action Dates will be opened and reviewed for detailed compliance with the administrative requirements of the ITP.

The State Evaluation Team will conduct the following reviews:

The State will review the proposal package to determine if the proper numbers of copies have been delivered and that the proposals have been submitted in the proper format.

The State will review all proposals to identify any "qualifiers" placed on the proposal. Conditional proposals are not acceptable.

The State will review and evaluate each of the other administrative requirements of the ITP to verify the Bidder's compliance. Also, customer references will be contacted for verification of Bidder experience and performance.

It is imperative that no cost figures be included in the Draft Proposal.

If any deviation from these requirements is found it shall be noted as a Confidential Discussion item.

9.3.1.2 Review of System and Operations Requirements

Each proposal will be evaluated as to technical completeness and compliance with the System and Operations Requirements of the ITP. If any deviation from these requirements is found it shall be noted as a Confidential Discussion item.

9.3.2 Confidential Discussions

Each Bidder submitting a Draft Proposal will be scheduled for a Confidential Discussion. The State Evaluation Team will prepare a Discussion Agenda of items to be discussed with the Bidder and transmit the agenda to the Bidder at least two (2) business days before the meeting. As the first order of business, the Bidder may be asked to give a short overview presentation of the Proposal. To the maximum extent practical, the Bidder will address the major concerns of the State Evaluation Team, as expressed in the Discussion Agenda. The Bidder should be prepared to answer any questions that may arise as a result of the presentation. The participants will then proceed to discuss each of the Discussion Agenda items.

At the end of the Confidential Discussion, the Bidder will be aware of the sections that the State found that require revision prior to submission of the Final Proposal. The Bidder is responsible for keeping track of all discussion items and their resolution. The State will not determine during this review if a defect could be material and cause the Final Proposal to be rejected. **The State does not warrant that it will find all defects in a Bidder's proposal.** It is the Bidder's responsibility to thoroughly review their Final Proposal prior to submission to ensure that all of the requirements of the ITP have been met.

9.3.3 Final Proposal

9.3.3.1 Proposal Opening And Validation Check

The proposals will be received in accordance with Section 2, Rules Governing Competition. The State will record the time of receipt and verify that the proposals were received in a sealed condition.

Final Proposals not received by the date and time specified in Section 1.5, Key Action Dates, or received not sealed will be rejected.

All proposals received by the date and time specified in ITP Section 1.5, Key Action Dates will be opened. The Proposals will then be checked for the presence of the required information in conformance with the requirements of this ITP. Absence of required information may deem the proposal non-responsive and may cause rejection.

9.3.3.2 Validation Against Requirements

The State will evaluate each Proposal in detail to determine compliance with the ITP requirements, particularly Section 5, Administrative Requirements and Section 6, System and Operations Requirements. If a proposal fails to meet a requirement, the State will determine if the deviation is material as defined in Section 2, Rules Governing Competition. A material deviation from a mandatory requirement or mandatory portion of a mandatory scorable requirement will cause rejection of the Proposal and no further consideration will be given to that Proposal. An immaterial deviation will be examined to determine if the deviation will be accepted. If accepted, the proposal will be processed as if no deviation had occurred. Scoring will not be performed for the scorable features of the mandatory scorable requirements for any proposal not meeting all mandatory requirements.

9.3.3.3 Review of Administrative Requirements

The State Evaluation Team will review and evaluate each Bidder's Final Proposal with respect to the ITP requirements to ensure that the Bidder has met all the Administrative Requirements of the ITP. It is the responsibility of the State Evaluation Team to evaluate the proposals and determine if the proposal is responsive to the requirements of the ITP.

The State Evaluation Team will conduct the following reviews:

The State will review the proposal package to determine if the proper number of copies have been delivered, that the proposals have been submitted in the proper format, and that the proposals have been signed by a person authorized to commit the company.

The State will review all proposals to identify any "qualifiers" placed on the bid. Conditional bids are not acceptable.

The State will review and evaluate each of the other Administrative Requirements of the ITP to verify the Bidder's compliance.

9.3.3.4 Review of System and Operations Requirements

Each proposal will be evaluated as to technical completeness and compliance with the System and Operation Requirements of the ITP. **All requirements in Section 6, System and Operations Requirements, are mandatory and will be evaluated on a pass/fail basis.**

9.3.3.5 Customer Reference List Evaluation

If a Bidder submits only a Final Proposal and has not submitted a Draft Proposal, customers from the Bidders reference list (and any other customers the State may select) will be contacted at this time. The customers will be interviewed in areas relevant to this ITP. Negative responses from customers may be cause for rejection of the proposal. Also, the State reserves the right to reconfirm all customer references identified in the Draft Proposal.

9.3.3.6 Cost Analysis

There will be a separate opening of Bidders costs, after responses to Administrative Requirements and System and Operations Requirements have been evaluated and scored. Costs will be opened only for those Bidders meeting all mandatory requirements and mandatory portions of the mandatory scorable Administrative Requirements. The required cost figures will be checked for mathematical accuracy. Error and inconsistencies will be dealt with according to procedures contained in Section 2.3.8.4, Errors in the Final Proposal. Only those cost adjustments will be made for which a procedure is described in this ITP.

9.3.3.7 Deleted

9.3.4 Evaluation Methodology

9.3.4.1 Mandatory Requirements

The Bidder's proposal must meet all of the mandatory requirements in Section 5, Administrative Requirements, and Section 6, System and Operations Requirements. The State will review all mandatory requirements first on a pass/fail basis. **PROPOSALS THAT DO NOT MEET ALL MANDATORY REQUIREMENTS MAY BE REJECTED.**

9.3.4.2 Mandatory Scorable Administrative Requirements

If all mandatory requirements are met, the State will evaluate the Bidder's responses to the Mandatory Scorable requirements. These requirements will first be evaluated on a pass/fail basis. **Proposals that do not meet all the mandatory portions of the Mandatory Scorable requirements may be rejected.**

If all mandatory portions of the Mandatory Scorable requirements are met, the State will award points for each requirement response based on how well the Bidder has met the requirement. Six hundred (600) maximum points will be available in this evaluation category. The following table illustrates the maximum points for each Mandatory Scorable Administrative Requirement.

Table 9-1: Maximum Points for Administrative Requirements

ITP Section	Administrative Requirement	Maximum Points Available
5.4	Corporate Background and Experience	60
5.5	Key Staffing	130
5.6	Project Management Plan	90
5.7	Implementation Plan	80
5.8	Capacity Plan	80
5.9	Settlement and Reconciliation Plan	80
5.10	Cash Access Plan	80
TOTAL ADMINISTRATIVE POINTS AVAILABLE		600

Points will be awarded for the Mandatory Scorable requirements according to the following criteria.

9.3.4.2.1 Corporate Background and Experience

Sixty (60) points are available for this category. Points may be awarded to a Bidder based upon information received from customer references provided in response to Section 5.4, Corporate Background and Experience. The State will be awarding points in this category based on customer satisfaction with the Bidder's past performance. The State will be seeking information from customer references regarding: satisfaction with the Bidder's performance in the areas of

- project management;
- performance in relation to the project work plan schedule, budget and expected level of quality;
- integration of all project activities over the life of the project;
- coordination of subcontractors;